

PROGRAM OPPORTUNITY NOTICE

Centers for Alternative Fuels and Advanced Vehicle Technology



PON-13-605

<http://www.energy.ca.gov/contracts/index.html>

State of California

California Energy Commission

August 2013

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I. Introduction

PURPOSE OF SOLICITATION

The California Energy Commission (Energy Commission) is seeking proposals to develop new centers or expand existing centers for alternative fuels and advanced vehicle technology.

The purpose of this solicitation is to unify activities that may provide future development and expansion of alternative fuels and advanced vehicle technologies through collaboration with existing and new centers throughout the state. A center for alternative fuels and advanced vehicle technologies can serve multiple purposes, such as:

- Identifying strategic opportunities for local agencies and companies to develop and demonstrate advanced technology vehicles.
- Providing a neutral site for individual companies to collaborate on technology demonstrations.
- Centralizing the attention of fleet managers interested in alternative fuels and advanced vehicles.
- Integrating vehicle technology as it is developed with workforce training efforts.

Additionally, centers can provide a cohesive platform for seeking outside funds, whether from the private sector (such as venture capital) or public sector (such as federal and state funds).

It is the intent of the Energy Commission that funds for this solicitation be used for development, construction, expansion, renting/leasing, and/or operation of a center serving the multiple functions described above. Funding from this solicitation may not be utilized to fund the various activities that may occur in the center. Other Alternative and Renewable Fuel and Vehicle Technology (ARFVT) solicitations may be available to provide funding opportunities for activities such as alternative fueling infrastructure, maintenance or production training, regional planning activities, or alternative fueled vehicles demonstrations. Other federal and state agencies also provide various funding for these types of activities that may occur in the center.

BACKGROUND

Assembly Bill 118 (Núñez, Chapter 750, Statutes of 2007), created the ARFVT Program. The statute, subsequently amended by AB 109 (Núñez, Chapter 313, Statutes of 2008), authorizes the Energy Commission to develop and deploy alternative and renewable fuels and advanced transportation technologies to help attain the state's climate change policies.

The ARFVT Program has an annual budget of approximately \$100 million and provides financial support for projects that:

- Reduce California's use and dependence on petroleum transportation fuels and increase the use of alternative and renewable fuels and advanced vehicle technologies.
- Produce sustainable alternative and renewable low-carbon fuels in California.
- Expand alternative fueling infrastructure and fueling stations.
- Improve the efficiency, performance and market viability of alternative light-, medium-, and heavy-duty vehicle technologies.
- Retrofit medium- and heavy-duty on-road and non-road vehicle fleets to alternative technologies or fuel use.

- Expand the alternative fueling infrastructure available to existing fleets, public transit, and transportation corridors.
- Establish workforce training programs and conduct public outreach on the benefits of alternative transportation fuels and vehicle technologies.

KEY ACTIVITIES & DATES

Key activities including dates and times for this solicitation are presented below. An addendum will be released if the dates change for the asterisked (*) activities.

ACTIVITY	ACTION DATE
Solicitation Release	August 23, 2013
Deadline for Written Questions*	October 21, 2013
Pre-Application Workshop*	September 6, 2013
Distribute Questions/Answers and Addenda (if any) to solicitation	October 29, 2013
Deadline to Submit Applications by 3:00 p.m.*	November 14, 2013
Anticipated Notice of Proposed Award Posting Date	December 20, 2013
Anticipated Commission Business Meeting Date	April/May 2014
Anticipated Agreement Start Date	June 2014

AVAILABLE FUNDING AND HOW AWARD IS DETERMINED

There is a total of \$4.7 million available for the agreements resulting from this solicitation. The Energy Commission, at its sole discretion, reserves the right to increase or reduce the amount of funds available under this solicitation.

The Energy Commission expects to make at least three awards of up to \$1,566,667 each to be distributed among Northern California, Central California, and Southern California.

- Northern California includes the counties of Santa Cruz, Santa Clara, San Mateo, San Francisco, Merced, Stanislaus, Alameda, San Joaquin, Tuolumne, Calaveras, Mono, Alpine, Amador, Sacramento, Solano, Napa, Marin, Sonoma, Yolo, El Dorado, Placer, Sutter, Colusa, Lake, Mendocino, Glenn, Butte, Nevada, Sierra, Yuba, Plumas, Tehama, Lassen, Shasta, Trinity, Humboldt, Del Norte, Siskiyou, Mariposa, Madera, Modoc, and Contra Costa.
- Central California includes the counties of San Luis Obispo, Kern, Inyo, Tulare, Kings, Monterey, San Benito, and Fresno.
- Southern California includes the counties of Santa Barbara, Ventura, Los Angeles, Orange, Riverside, San Bernardino, San Diego, and Imperial.

Competitive Solicitation: Applicants compete based on selection criteria and are scored and ranked based on those criteria. The highest scoring proposal in each region, achieving at least the minimum technical score, will be recommended for funding.

If the Energy Commission does not receive passing proposal(s) requesting the full \$1,566,667 in one or more of the regions, the Energy Commission reserves the right, at its sole discretion, to redirect the remaining funding balance for that region to other regions that have passing, but unfunded proposals. Funds will be redirected to the highest scoring, unfunded applicants.

More than one project per region may be funded if the highest scoring project for that region is less than \$1,566,667 or there are no eligible proposals in another region. If multiple regions have highest scoring projects with less than \$1,566,667, but the remaining amount is not enough to fund the next highest scoring proposals, then the Energy Commission reserves the right to combine the remaining funding from multiple regions to fund the next overall highest scoring proposal(s).

PRE-APPLICATION WORKSHOP

There will be one Pre-Application Workshop; participation in this meeting is optional but encouraged. The Pre-Application Workshop will be held through in-person participation, WebEx, and conference call at the date, time and location listed below. Please call (916) 654-4381 or refer to the Energy Commission's website at www.energy.ca.gov/contracts/index.html to confirm the date and time.

Friday, September 6, 2013

9:00 AM

California Energy Commission
Hearing Room A
1516 9th Street
Sacramento, CA 95814

Participation through WebEx

For participation through WebEx, the Energy Commission's on-line meeting service, follow the instructions below:

Computer logon with a direct phone number:

- * Please go to <https://energy.webex.com> and enter the unique meeting number **494 557 375**
- * When prompted, enter your information and the following meeting password: **meeting@9**
- * After you login, a prompt will appear on-screen for you to provide your phone number. In the Number box, type your area code and phone number and click OK to receive a call back on your phone for the audio of the meeting. International callers can use the "Country/Region" button to help make their connection.

Computer logon for callers with an extension phone number, etc.:

- * Please go to <https://energy.webex.com> and enter the unique meeting number **494 557 375**
- * When prompted, enter your information and the following meeting password: **meeting@9**
- * After you login, a prompt will ask for your phone number. CLICK CANCEL.
- * Instead call 1-866-469-3239 (toll-free in the U.S. and Canada). When prompted, enter the meeting number above and your unique Attendee ID number which is listed in the top left area of your screen after you login. International callers can dial in using the "Show all global call-in numbers" link (also in the top left area).

Telephone only (no computer access):

To receive a call back, provide your phone number when you join the meeting, or call the number below and enter the access code.
Call-in toll-free number (US/Canada): 1-866-469-3239

Call-in toll number (US/Canada): 1-650-429-3300

Global call-in numbers:

<https://energy.webex.com/energy/globalcallin.php?serviceType=MC&ED=19423398&tollFree=1>

Toll-free dialing restrictions: http://www.webex.com/pdf/tollfree_restrictions.pdf

Access code:494 557 375

If you have difficulty joining the meeting, please call the WebEx Technical Support number at 1-866-229-3239. Please be aware that the meeting's WebEx audio and on-screen activity may be recorded.

IMPORTANT NOTICE: This WebEx service includes a feature that allows audio and any documents and other materials exchanged or viewed during the session to be recorded. You should inform all meeting attendees prior to recording if you intend to record the meeting. Please note that any such recordings may be subject to discovery in the event of litigation.

QUESTIONS

During the solicitation process, questions of clarification about this solicitation must be directed to the Commission Agreement Officer listed in the following section. You may ask questions at the Pre-Application Workshop and submit written questions by mail, electronic mail, and FAX. However, all questions must be received by 5:00 pm on the date listed under the Key Activities and Dates.

Question and answer sets will be e-mailed to all parties who attended the Pre-Application Workshop and provided their contact information on the sign-in sheet. The questions and answers will also be posted on the Energy Commission's website at:
<http://www.energy.ca.gov/contracts/index.html>.

Any verbal communication with an Energy Commission employee concerning this solicitation is not binding on the State and shall in no way alter a specification, term, or condition of the solicitation. Therefore, all communication should be directed in writing to the Commission Agreement Officer assigned to the solicitation.

CONTACT INFORMATION

Albert De Leon, Commission Agreement Officer
California Energy Commission
1516 Ninth Street, MS-18
Sacramento, California 95814
Telephone: (916) 654-4299
FAX: (916) 654-4423
E-mail: albert.deleon@energy.ca.gov

REFERENCE DOCUMENTS

Applicants responding to this solicitation may want to familiarize themselves with the following documents:

2012-2013 Investment Plan for the Alternative and Renewable Fuel and Vehicle Technology Program (CEC-600-2012-001-CMF)

[<http://www.energy.ca.gov/2011-ALT-1/index.html>]

2013-2014 Investment Plan Update for the Alternative and Renewable Fuel and Vehicle Technology Program (CEC-600-2012-008-CMF)

[<http://www.energy.ca.gov/2012-ALT-2/documents/>]

II. Eligibility Requirements

ELIGIBLE APPLICANTS

This is an open solicitation for public and private entities. An Applicant can only apply for one region. Each agreement resulting from this solicitation includes terms and conditions that set forth the recipient's rights and responsibilities. All entities (except for the University of California (UC) and U.S. Department of Energy National Laboratories) must agree to use the attached standard terms and conditions (Attachments 07 and 08). The UCs and national laboratories have the option to use the applicable pre-negotiated terms and conditions at the following website: (<http://www.energy.ca.gov/contracts/pier.html#piergeneralinfo>). The Energy Commission will not award agreements to non-complying entities. The Energy Commission reserves the right to modify the terms and conditions prior to executing agreements.

To be eligible, Applicants must have a business presence in California. All corporations, limited liability companies (LLCs) and limited partnerships (LPs) are required to register and be in good standing with the California Secretary of State to enter into an agreement with the Energy Commission. If not currently registered with the California Secretary of State, Applicants are encouraged to contact the Secretary of State's Office as soon as possible to avoid potential delays in beginning the proposed project(s) (should the application be successful). For more information, contact the Secretary of State's Office via its website at www.sos.ca.gov.

ELIGIBLE PROJECTS

To be an "Eligible Project" for this solicitation, the proposed center must: 1) be located in one of the three geographic regions within California (Northern California, Central California, and Southern California) defined in the "Available Funding And How Award is Determined" section; 2) support two or more local agencies and businesses within the region; and 3) do one or more of the following:

- Identify strategic opportunities to develop and demonstrate advanced technology vehicles.
- Provide a neutral site for individual companies to collaborate on technology demonstrations.
- Centralize the attention of fleet managers interested in alternative fuels and advanced vehicles.
- Integrate vehicle technology development with workforce training efforts.
- Serve multiple functions to support and promote local and regional alternative fuel vehicles, which may include demonstration ~~(excluding vehicle demonstration)~~, maintenance and/or technical training/educational services associated with multiple alternative fuels, fueling systems and/or vehicle technologies.
- Provide a central location for local and regional planning for development and deployment of alternative fuels, fueling infrastructure, or alternative fueled vehicles.

A center can be either a physical facility or a virtual center. An applicant proposing a statewide virtual center must apply under the region expected to receive the most benefits from the proposed project.

For the purposes of this solicitation:

- Alternative fuels include, but are not limited to electricity, natural gas, biogas, hydrogen, ethanol, biodiesel, and renewable diesel.
- Alternative fueling systems include commercial, institutional and/or residential demonstrations of fuel dispensing systems for the above-listed alternative fuels.
- Alternative vehicles technologies include, but are not limited to:
 - Electric drive cars, trucks, shuttles, buses, or off-road equipment.
 - Natural gas/biogas cars, trucks, shuttles, buses, or off-road equipment.
 - Hydrogen fuel cell cars, trucks, shuttles, buses, or off-road equipment.
 - Various hybrid configurations of the above listed technologies.
 - Technologies for efficiency, emissions reductions, and/or optimization.

Eligible expenditures include, but are not limited to costs to develop, construct, expand, rent/lease, and/or operate the proposed center. These costs may include, but are not limited to:

- Personnel costs for technology specialists, engineers, planners, managers, etc.
- Contracting costs for these same disciplines.
- Equipment and material costs needed for the everyday operation of the proposed center, excluding food, drink, or entertainment costs.
- Operations and maintenance costs.
- Administrative costs.

The following project types ARE NOT eligible for funding under this solicitation:

- Feasibility studies to develop a center or feasibility studies on projects to be developed by a center.
- Surveys to determine interest in or the efficacy of having a center.
- Construction or operation of a center whose sole function is developing research projects and/or conducting research.
- Any type of vehicle demonstration.

Expenditures other than for developing, constructing, expanding, renting/leasing, and/or operation of a center ARE NOT eligible for reimbursement under this solicitation and the resulting agreement(s). Examples of such non-eligible expenditures include, but are not limited to:

- Costs to install fueling infrastructure.
- Costs to provide/produce maintenance training (such as stocking fees for tools).

PARTNERSHIP REQUIREMENTS

Each proposal shall include a summary of the expected activities to be conducted at the proposed center. In addition, the proposal should contain a plan to recruit key partners along with a list of expected partnerships. Such partnerships may include, but are not limited to: manufacturers and suppliers of alternative fueling systems and alternative technology vehicles; transit agencies or districts; local and regional school districts; vocational colleges or universities; municipal and regional government entities; not-for-profit organizations; state agencies; or federal agencies.

MATCH FUNDING REQUIREMENTS

To be eligible applications must include a **minimum 50 percent match share** of the total project cost. **Funds from the Energy Commission (e.g., awards from other Commission programs) cannot count towards the match share requirement.** ~~from non-California state-agency sources except that California public colleges and universities including the California Community Colleges, California State Universities, Universities of California, or other entities that are funded from state sources can count their own funds contributed to the project as match but not the funds from other California state-agency sources. For example, a state-funded university that has received a grant from another state agency for related work can use its own funds as match but not the funds from the grant.~~

Applications with a greater percentage of the total allowable project costs in match share funding will be scored higher than those with lower match share funding. Please see Section IV for scoring criteria.

“Match funding” or “match share” means cash or in-kind (non-cash) contributions provided by the Applicant/Recipient, subcontractors, or other parties that will be used in performance of the proposed project. Match share percentage is calculated by dividing the total match share contributions by the total allowable project cost. “Total allowable project cost” is the sum of the Energy Commission’s reimbursable share and Recipient’s match share of the project costs. Match share expenditures must adhere to the following requirements:

- A. All match share expenditures must conform to the terms and conditions of this solicitation and the resulting agreement (see Attachment 07).
- B. Applicants must disclose the source and provide verification and documentation for the match share funding committed to the project. For match share committed by a third-party (i.e., other than the match share committed by the Applicant), Applicant must submit a letter of commitment from each match share partner identifying the source(s) and availability of match funding.
- C. During the term of the agreement, Recipients will be required to document and verify all match share expenditures through invoices submitted to the Energy Commission.
- D. Match share funding may be in the form of cash or in-kind contributions such as donated labor hours, equipment, facilities, and other property.
 1. Equipment, facilities, and property may count as match funds as long as the value of the contribution is based on documented market values or book values, prorated for its value to the project, and depreciated or amortized over the term of the project using standard accounting principles.

Match share expenditures are allowable under an agreement only if they are incurred after the Energy Commission notifies the applicant that its project has been proposed for an award through the release of a Notice of Proposed Awards (NOPA). Match expenditures incurred prior to the approval and signing of an agreement are made at the applicant's own risk. The Energy Commission is not liable for Applicant's match share costs if the grant is not approved, if approval is delayed, or if the match share expenditure is not allowable under the terms and conditions of the grant or this solicitation.

III. Application Format, Required Documents, and Delivery

ABOUT THIS SECTION

This section contains the format requirements and instructions on how to submit an application. The format is prescribed to assist the Applicant in meeting State requirements and to enable the Energy Commission to evaluate each application uniformly and fairly. Applicants must follow all Application format instructions, answer all questions, and supply all requested data.

REQUIRED FORMAT FOR AN APPLICATION

All applications submitted under this solicitation must be typed or printed using a standard 11-point font, singled-spaced and a blank line between paragraphs. Pages must be numbered and sections titled and printed back-to-back. Spiral or comb binding is preferred and tabs are encouraged. Binders are discouraged. Original of application should be bound only with a binder clip.

NUMBER OF COPIES

Applicants must submit the original and 5 copies of the application.

Applicants must also submit electronic files of the application on **CD-ROM or USB memory stick** along with the paper submittal. Only one CD-ROM or USB memory stick is needed. Electronic files must be in Microsoft Word XP (.doc format) and Excel Office Suite formats. Completed Budget Forms, Attachment 05, must be in Excel format.

PACKAGING AND LABELING

The original and copies of the application must be labeled "Program Opportunity Notice PON-13-605," and include the title of the application.

Include the following label information and deliver your application, in a sealed package:

Person's Name, Phone #
Applicant's Name
Street Address
City, State, Zip Code
FAX #

California Energy Commission
Contracts, Grants & Loans Office
Attn: PON-13-605
1516 Ninth Street, 1st Floor, MS-18
Sacramento, California 95814

PREFERRED METHOD FOR DELIVERY

An Applicant may deliver an application by:

- U. S. Mail
- In Person
- Courier service

Applications must be delivered to the Energy Commission's Contracts, Grants and Loans Office during normal business hours and prior to the date and time specified in this solicitation. Applications received after the specified date and time are considered late and will not be accepted. There are no exceptions to this requirement. Postmark dates of mailing, E-mail and facsimile (FAX) transmissions are not acceptable in whole or in part under any circumstances.

ORGANIZE YOUR APPLICATION AS FOLLOWS

Proposal Cover Page	
A. Table of Contents	
B. Application Form	Attachment 01
C. Project Narrative	
D. Scope of Work	Attachment 02 (SOW Instructions Attachment 03)
E. Schedule of Products and Due Dates	Attachment 04
F. Resumes	
G. Letter(s) of Support/Commitment	
H. Budget Forms	Attachment 05
I. Contacts	Attachment 06
J. ARFVTP Funding Restrictions Certification	Attachment 09
K. CEQA Worksheet	Attachment 10
L. Local Health Impacts Information	Attachment 11

- A. Table of Contents:** Each Application must include a table of contents that specifies Application elements and corresponding page numbers to assist in the review and evaluation of the Application.
- B. Application Form:** Applicants must include a complete and signed Application Form shown in Attachment 01. The Application Form must be signed by an authorized representative of the Applicant's organization. This signature certifies that all information in the application is correct and complete to the best of the applicant's knowledge AND that the applicant has read the Terms and Conditions and will accept them without negotiation if awarded.

The Application Form shall also include, at a minimum, a project description, project goals, and quantitative and measurable objectives to be achieved.

- C. Project Narrative:** Applicants should provide sufficient detail in the project narrative to allow the Evaluation Committee to evaluate the Application against the screening and technical scoring criteria. The Project Narrative must not exceed 30 pages.

The Project Narrative must:

1. Include a detailed description of the proposed project, including operational goals, objectives, and a list of local agencies and businesses within the project region that will be supported by the proposed center. Provide all available supporting documentation (e.g., architectural plan, etc.).
2. Describe the functions of the Applicant and each team member, including identification of the entity that will own and operate the proposed center(s).
3. Describe team member qualifications including:
 - ✓ Relevant technical and business experience.
 - ✓ Description on how the qualifications align with the needs of the project, including the ability of the team to meet deadlines and complete milestones associated with large, complex projects.
 - ✓ Description on why the applicant/project team is well suited to successfully complete and operate the proposed center.
4. Describe how the proposed project will be completed timely, effectively, efficiently, and within budget.
5. Describe activities/functions that will occur at the proposed center(s) and how they will be funded. Describe the amount of non-state Match Funds (cash and/or in-kind services) and provide verification and documentation of the source and availability. Provide details (name and business location, type of entity, amount, etc.) for each funding partner.
6. Describe how the proposed project location enhances the project's ability to achieve the identified goals and objectives of the project including the expected economic/regional benefits described in the application.
7. Identify key financial and contractual relationships needed to complete the project.
8. Describe a plan to recruit key partners including a list of existing or expected partnerships.
9. Describe how the applicant has, or expects to obtain, site control or access rights to the proposed project site and/or building facility. If available, attach documentation demonstrating site control (e.g., title, lease agreements, contract agreements, etc.). Documentation of site control does not count towards the project narrative page limitations.
10. Identify the location of the project including whether the proposed project is located at an existing facility. Describe the existing or prior use of the project site and/or building facility.
11. Describe the existing zoning classification for the proposed site and whether the proposed project is consistent with the current zoning classification. If necessary, discuss plans and strategies to bring proposed project in compliance with zoning classifications.
12. Describe permits and CEQA compliance documentation necessary for the proposed project along with the anticipated schedule for obtaining permits/CEQA

compliance. If available, attach copies of permits already obtained and/or CEQA compliance documentation. Copies of permits and CEQA compliance documentation do not count towards the project narrative page limitations.

13. Describe how the proposed project will be developed cost-effectively. Explain why state funds are needed for the proposed center(s) to go forward and if the funding request is consistent with the expected level of public and private benefits that will accrue if the proposed center(s) is successful. Describe how the budget is apportioned to key project tasks.
 14. Provide a cash-flow projection for the center for the first five years over the duration of the project with assumptions/barriers and funding sources identified, and mitigation measures to address any barriers. Provide, if necessary, planned strategies to secure capital to ensure project success.
 15. Quantify the direct California jobs created or retained by the proposed project through 2020. Document all calculations and assumptions used.
 16. Provide data in the project area for unemployment and location of economically distressed areas. Indicate if the project is located in a national or state economically enhanced area (i.e., enterprise zone, enhanced manufacturing area).
 17. Describe economic development impacts through 2020 expected as a result of the proposed project. Document all calculations and assumptions used.
 18. Describe and quantify the expected regional benefits of each proposed center by 2020. Such benefits may include, but not be limited to, increased ambient air quality and public health, increased public awareness of alternative technology fuels and vehicles, increased demonstration and deployment of alternative technology fuels and vehicles, and/or increased alternative fuel and alternative fuel vehicle training opportunities. Document all calculations and assumptions used.
 19. Describe and quantify how the proposed center will help demonstrate alternative fueling and alternative fueled vehicles, reduce greenhouse gas (GHG) emissions, and reduce petroleum use in the proposed region by 2020. Document all calculations and assumptions used.
- D. Scope of Work:** Applicants must include a completed Scope of Work utilizing the template contained in Attachment 02. Instructions for completing the Scope of Work as well as a sample are included in Attachment 03. The description of activities proposed in the Project Narrative must conform to the Tasks described in the Scope of Work. Electronic files for the Scope of Work must be in MS Word.
- E. Schedule of Products and Due Dates:** Applicants must include a completed Schedule of Products and Due Dates (Attachment 04). All work must be scheduled for completion by June 30, 2017. Instructions for the Schedule of Products and Due Dates are included in Attachment 04. Electronic files for the Schedule of Products and Due Dates must be in MS Excel.
- F. Resumes:** For each key individual, include individual resumes (maximum of two pages each) which includes company, organization/agency, position title, job description, and contact information.

G. Letters of Support/Commitment: Applications should include letter(s) of support/commitment (maximum of two pages each) from key project partners.

1. Third-Party Match Share Commitment (MANDATORY, if applicable): For match share committed by a third-party (i.e., other than the match share committed by the Applicant), Applicant must submit a letter of commitment from each match share partner identifying the source(s) and availability of match funding.
2. Key Project Partners (MANDATORY, if applicable): The Application shall include a letter of commitment from every key project partner. The letter of commitment shall include complete contact information so the Energy Commission is able to efficiently contact the letter writer, as necessary.
3. Third-Party Letters of Support (OPTIONAL): Applicants are encouraged to submit additional letter(s) of support that further substantiate the estimated demand and/or the potential benefits of the proposed center(s). Third-party letters of support can be provided by, but are not limited to: air districts, state or federal agencies, school districts, alternative fuel providers, alternative vehicle manufacturers, fleet operators, and any other organizations.

H. Budget Forms and Information

Task Summary	Attachment 05, Attachment B-1
Category Summary	Attachment 05, Attachment B-2
Prime Labor Rates	Attachment 05, Attachment B-3
Labor Rates for each Subcontractor	Attachment 05, Attachment B-3a
Prime Non-Labor Rates	Attachment 05, Attachment B-4
Non-Labor Rates for each Subcontractor	Attachment 05, Attachment B-4a
Direct Operating Expenses	Attachment 05, Attachment B-5
Match Funding	Attachment 05, Attachment B-6

1. The Applicant must submit information on **all** of the attached budget forms, B-1 through B-6. Detailed instructions for completing these forms are included at the beginning of Attachment 05. All budget forms are required because they will be used for the agreement prepared with the winning Applicant(s).
2. Rates and personnel shown must reflect rates and personnel you would charge if you were chosen as the Recipient for this solicitation. The salaries, rates, and other costs entered on these forms become a part of the final agreement. The entire term of the agreement and projected rate increases must be considered when preparing the budget. The rates proposed are considered capped and shall not change during the term of the agreement. The Recipient shall only be reimbursed for their **actual** rates up to these rate caps. The hourly rates provided in all B-3s shall be unloaded (before fringe benefits, overheads, or general and administrative (G&A)).
3. **NOTE:** The information provided in these forms will **not** be kept confidential.

4. All reimbursable expenditures must be expended within the approved term of the funding agreement. The requirements for match share funding are described in Section II of this solicitation.
5. The Budget should allow for the expenses of a Kick-off Meeting, at least one (1) Critical Project Review meeting, and a Final meeting. It is anticipated that meetings will be conducted at the Energy Commission located in Sacramento, CA.
6. Expenditures related to permits and insurance are not an eligible for Energy Commission reimbursement, but may be counted toward the Applicant's proposed match share contribution to the project if incurred after the NOPA and before the end of the agreement.
7. The Budget should allow for the preparation and submission of monthly progress reports (1-2 pages each) during the approved term of the agreement, and a Final Report. Instructions for preparing the Final Report will be provided to successful Applicants.
8. The purchase of equipment (defined as items with a unit cost greater than \$5,000 and a useful life of greater than one year) with Energy Commission funds will require disposition of purchased equipment at the end of the project. Typically, Grant Recipients may continue to utilize equipment purchased with Energy Commission funds as long as the use is consistent with the intent of the original agreement. There are no disposition requirements for equipment purchased with match share funding.
9. The Budget must reflect estimates for actual costs to be incurred during the approved term of the project. The Energy Commission can only approve and reimburse for actual costs that are properly documented in accordance with the Agreement Terms and Conditions.
10. The Budget must NOT include any profit from the proposed project, either as a reimbursed item or as match share. Please review the Agreement Terms and Conditions for additional restrictions and requirements.
11. **IMPORTANT- Payment of Prevailing Wages:** All applicants must read and pay particular attention to ARFVTP Terms and Conditions, Exhibit C, Section 27 entitled "Public Works -- Payment of Prevailing Wages". Prevailing wage rates can be significantly higher than non-prevailing wage rates. Failure to pay legally-required prevailing wage rates can result in substantial damages and financial penalties, termination of the agreement, disruption of projects, and other complications.

I. Contacts

Applicants must complete the Recipient Information on Attachment 06.

J. ARFVTP Funding Restrictions Certification

Applicants must review Attachment 08, Special Terms and Conditions regarding ARFVTP "Funding Restrictions" then carefully review and complete the certification on Attachment 09.

K. CEQA Worksheet

Applicants must complete Attachment 10. Projects awarded State funding are required to comply with the California Environmental Quality Act if their project meets the legal definition of "project" as defined in CEQA (Public Resources Code Section 21000 et seq.) A "project" is an action requiring a discretionary approval (such as a permit) from a local or state agency that has the potential to cause a direct physical change to the environment.

Applicants will be required to provide all required documentation to demonstrate CEQA compliance prior to award of the Grant money. The Energy Commission must comply with its legal obligation under CEQA prior to advancing an application to the Business Meeting for Energy Commission approval. The Energy Commission will not reimburse for any costs associated with CEQA compliance.

Please begin CEQA compliance work as soon as feasible so as not to delay a potential award. Because the Energy Commission has a statutory deadline in which to encumber the funds into agreements, **applicants are cautioned that failure to comply with CEQA within 3 months (90 days) after the Notice of Proposed Award (NOPA) is posted may result in loss of the award.** Due to this timeframe, applicants are encouraged, but not required, to submit proposals that use existing facilities (or only slightly modify them) and not to submit proposals for construction of new facilities.

L. Local Health Impacts Information

Applicants must complete Attachment 11 for all sites where work for the proposed project that will require a permit will be done. Attach additional pages if necessary. If the project includes multiple sites, you may submit this information in a table format using column headers described in Attachment 11.

IV. Evaluation Process and Criteria

ABOUT THIS SECTION

This section explains how the applications will be screened and evaluated.

APPLICATION EVALUATION

An Applicant's application will be evaluated and scored based on their response to the information requested in this solicitation. The entire evaluation process from receipt of applications to posting of the Notice of Proposed Award is confidential.

To evaluate all Applications, the Energy Commission will organize an Evaluation Committee. The Evaluation Committee may consist of Energy Commission staff or staff of other California state entities.

The Applications will be evaluated in two stages:

Stage One: Screening Criteria

The Contracts, Grants and Loans Office will screen Applications for compliance with the Administrative Screening Criteria identified below. The Evaluation Committee will screen Applications for compliance with the Technical Screening criteria identified below. Applications that fail any of the Administrative or Technical Screening Criteria shall be disqualified and eliminated from further evaluation.

Administrative Screening Criteria

1. The application is received by the Energy Commission's Contracts, Grants and Loans Office by the specified due date and time in Section I of this solicitation.
2. The Application Form (Attachment 01) is complete and is signed by the Applicant's authorized representative.
3. The application does not contain confidential information or any portion marked confidential.
4. The Applicant agrees to the Terms and Conditions (Exhibit C) and the Special Terms and Conditions (Exhibit D), and to meet all requirements of the solicitation by signing the Application Form.
5. The Applicant does not include any statement in the Application that acceptance is based on modifications to those terms and conditions or separate terms and conditions.
6. The application is prepared in the mandatory format described.
7. The budget forms are filled out completely.
8. The Applicant provides the minimum 50% match share requirement (Section II, Match Funding Requirements).

Technical Screening Criteria

1. The applicant is an eligible applicant (Section II, Eligible Applicants).
2. The project is an eligible project (Section II, Eligible Projects).

Grounds to Reject an Application

In addition to the Screening Criteria identified above, the Energy Commission reserves the right to reject an application and/or cancel an award if at any time during the application or agreement process the following circumstances are discovered:

- It contains false or intentionally misleading statements or references which do not support an attribute or condition contended by the Applicant.
- The Application is intended to erroneously and fallaciously mislead the State in its evaluation of the Application and the attribute, condition, or capability is a requirement of this solicitation.
- It does not literally comply or contains caveats that conflict with the solicitation and the variation or deviation is material or it is otherwise non-responsive.
- The applicant has previously received funding through a Public Interest Energy Research (PIER) agreement, has received the PIER Royalty Review letter which the Energy Commission annually sends out to remind past Recipients of their obligations to pay royalties, and has not responded to the letter or is otherwise not in compliance with repaying royalties.

Stage Two: Technical and Cost Evaluation of Applications

Applications passing Stage One will be submitted to the Evaluation Committee to review and score based on the Evaluation Criteria in this solicitation.

During the evaluation and selection process, the Evaluation Committee may schedule a clarification interview with an Applicant that will either be held by telephone or in person at the Energy Commission for the purpose of clarification and verification of information provided in the application. However, these interviews may not be used to change or add to the contents of the original Application. Applicants will not be reimbursed for time spent answering clarifying questions.

The total score for each Application will be the average of the combined scores of all Evaluation Committee members.

A minimum score of 70 percent is required for the Application to be eligible for funding. Passing projects will be ranked according to score in the three geographic areas identified earlier in this solicitation (Northern California, Central California, and Southern California). Projects achieving the minimum technical score will be recommended for funding in each geographic area in ranked order (from highest to lowest score) until all funds available under this solicitation are awarded.

SCORING SCALE

Using this Scoring Scale, the Evaluation Committee will give a score for each criterion described in the Evaluation Criteria Worksheet.

% of Possible Points	Interpretation	Explanation for Percentage Points
0%	Not Responsive	Response does not include or fails to address the requirements being scored. The omission(s), flaw(s), or defect(s) are significant and unacceptable.
10-30%	Minimally Responsive	Response minimally addresses the requirements being scored. The omission(s), flaw(s), or defect(s) are significant and unacceptable.
40-60%	Inadequate	Response addresses the requirements being scored, but there are one or more omissions, flaws, or defects or the requirements are addressed in such a limited way that it results in a low degree of confidence in the proposed solution.
70%	Adequate	Response adequately addresses the requirements being scored. Any omission(s), flaw(s), or defect(s) are inconsequential and acceptable.
80%	Good	Response fully addresses the requirements being scored with a good degree of confidence in the Applicant's response or proposed solution. No identified omission(s), flaw(s), or defect(s). Any identified weaknesses are minimal, inconsequential, and acceptable.
90%	Excellent	Response fully addresses the requirements being scored with a high degree of confidence in the Applicant's response or proposed solution. Applicant offers one or more enhancing features, methods or approaches exceeding basic expectations.
100%	Exceptional	All requirements are addressed with the highest degree of confidence in the Applicant's response or proposed solution. The response exceeds the requirements in providing multiple enhancing features, a creative approach, or an exceptional solution.

NOTICE OF PROPOSED AWARD

The results of the Energy Commission's decision of proposed funding level, the rank order of applicants, and the amount of each proposed award will be posted in a Notice of Proposed Awards (NOPA). The Energy Commission will post a NOPA at the Energy Commission's headquarters in Sacramento, on the Energy Commission's website, and will mail the NOPA to all parties that submitted an application.

DEBRIEFINGS

Unsuccessful Applicants may request a debriefing after the release of the NOPA. A request for debriefing must be received no later than 15 days after the NOPA is released.

EVALUATION CRITERIA	Possible Points
<p>Relevant Experience and Qualifications</p> <ol style="list-style-type: none"> 1. Degree to which the applicant/project team are well suited to successfully complete and operate the proposed center. 2. Degree to which the applicant explains the functions each team member will perform. 3. Degree to which team member qualifications, relevant technical experience, and relevant business experience align with the needs of the project. 4. Degree to which the applicant describes demonstrated ability to meet deadlines and complete milestones associated with large, complex projects. 	10
<p>Project Implementation</p> <ol style="list-style-type: none"> 1. Degree to which the applicant presents a comprehensive and credible scope of work which includes, in a logical manner, the project schedule, the sequence of tasks, and how the tasks are related to or are dependent on each other. 2. Degree to which the identified team member functions are appropriate to effectively implement the proposed project. 3. Degree to which the applicant identifies the necessary equipment and materials for the project. 4. Degree to which the applicant demonstrates that the proposed project will be completed timely, effectively, efficiently and within budget. 5. Degree to which the proposed project location enhances the project's ability to achieve the identified goals and objectives of the project including the expected economic/regional benefits described in the application. 	20
<p>Project Readiness</p> <ol style="list-style-type: none"> 1. Degree to which the key financial and contractual relationships needed to complete the project are documented through letters of commitment from key project supporters/partners. 2. Degree to which the Applicant provides a comprehensive, credible, and relevant plan to recruit key partners. 3. Degree to which the applicant has documented site control or access rights to the proposed project site and/or building facility. 4. Degree to which the project has obtained required permitting, including California Environmental Quality Act (CEQA) compliance. Projects that have obtained necessary permits or are in the process of obtaining permits will be scored higher. 5. Degree to which the project adheres to the existing zoning classification for the proposed location. 	15

Project Budget/Finance <ol style="list-style-type: none"> 1. Degree to which the applicant demonstrates the need for state funding. Applications stronger in demonstrating and justifying the need for state funding will be scored higher. 2. Degree to which the budget is effectively apportioned among the key project tasks. 3. Degree to which additional non-state matching funds (cash and/or in-kind services) are committed to the project above and beyond the minimum match share required in the solicitation. 4. Degree to which the applicant presents credible strategies in securing additional capital, as needed, to ensure project success. 5. Degree to which the application demonstrates the viability of continued operation for at least five years. 	15
Expected Economic Benefits <ol style="list-style-type: none"> 1. Number of direct California jobs (full-time equivalent) created or retained by the project through 2020. Proposed projects documenting a greater number of direct California jobs will score higher. 2. Degree to which the proposed project benefits economically distressed and/or high unemployment areas within California. 3. Degree to which the proposed project increases economic development by 2020. 	10
Expected Regional Benefits <ol style="list-style-type: none"> 1. By 2020, degree to which the proposed project: <ul style="list-style-type: none"> • Improves ambient air quality. • Improves public health. • Increases public awareness of alternative technology fuels and vehicles. • Increases demonstration and deployment of alternative technology fuels and vehicles. • Increases alternative fuel and alternative fuel vehicle training opportunities. • Reduces greenhouse gas (GHG) emissions. • Reduces petroleum use. • Provides other benefits to California. 2. Degree to which the application documents assumptions and calculations used to determine benefits of proposed project. 3. Degree to which assumptions and calculations are reasonable. 	30
Total Points Possible	100

TIE BREAKERS

In the event of tied scores, the following tie-breaker methods will be used to resolve the tie:

- An application that scored higher in the evaluation criteria in the following order of importance will be ranked higher. For example, if the tie is not resolved by comparing the scores in the Expected Regional Benefits criterion, then the scores in the next criterion on the list below will be compared until the tie is resolved.
 1. Expected Regional Benefits
 2. Project Implementation
 3. Project Budget/Finance
 4. Project Readiness
 5. Relevant Experience and Qualifications
 6. Expected Economic Benefits
- If the above method does not resolve the tie, then an application with a higher match funding percentage will be ranked higher.
- If a tie still exists, an objective tie breaker will be utilized.

V. Administration

DEFINITION OF KEY WORDS

Important definitions for this solicitation are presented below:

Word/Term	Definition
Applicant	Respondent to this solicitation
Application	Formal written response to this document from Applicant
CAM	Commission Agreement Manager
CAO	Commission Agreement Officer
CEQA	California Environmental Quality Act
Energy Commission	California Energy Commission
NOPA	Notice of Proposed Awards
Solicitation	Program Opportunity Notice, which refers to this entire solicitation document and all its attachments and exhibits
State	State of California

COST OF DEVELOPING APPLICATION

The Applicant is responsible for the cost of developing an application, and this cost cannot be charged to the State.

CONFIDENTIAL INFORMATION

The Energy Commission will not accept or retain any Applications that have any portion marked confidential.

The entire evaluation process from receipt of Applications up to the posting of the Notice of Proposed Award is confidential. However, Applications and all submittals will become public records after the Energy Commission posts the Notice of Proposed Awards or the solicitation is cancelled.

SOLICITATION CANCELLATION AND AMENDMENTS

It is the policy of the Energy Commission not to solicit applications unless there is a bona fide intention to award an agreement. However, if it is in the State's best interest, the Energy Commission reserves the right to do any of the following:

- Cancel this solicitation;
- Revise the amount of funds available under this solicitation;
- Amend this solicitation as needed; or
- Reject any or all Applications received in response to this solicitation.

If the solicitation is amended, the Energy Commission will send an addendum to all parties who requested the solicitation and will also post it on the Energy Commission's website www.energy.ca.gov/contracts.

ERRORS

If an Applicant discovers any ambiguity, conflict, discrepancy, omission, or other error in the solicitation, the Applicant shall immediately notify the Commission of such error in writing and request modification or clarification of the document. Modifications or clarifications will be given by written notice of all parties who requested the solicitation, without divulging the source of the request for clarification. The Energy Commission shall not be responsible for failure to correct errors.

MODIFYING OR WITHDRAWAL OF APPLICATION

An Applicant may, by letter to the Contact Person at the Energy Commission, withdraw or modify a submitted Application before the deadline to submit applications. Applications cannot be changed after that date and time. An Application cannot be "timed" to expire on a specific date. For example, a statement such as the following is non-responsive to the solicitation: "This application and the cost estimate are valid for 60 days."

IMMATERIAL DEFECT

The Energy Commission may waive any immaterial defect or deviation contained in an Applicant's application. The Energy Commission's waiver shall in no way modify the application or excuse the successful Applicant from full compliance.

DISPOSITION OF APPLICANT'S DOCUMENTS

On the Notice of Proposed Award posting date all applications and related material submitted in response to this solicitation become a part of the property of the State and public record. Applicants who want any work examples they submitted with their applications returned to them shall make this request and provide either sufficient postage, or a Courier Charge Code to fund the cost of returning the examples.

APPLICANTS' ADMONISHMENT

This solicitation contains the instructions governing the requirements for an application to be submitted by interested Applicants, the format in which the technical information is to be submitted, the material to be included, the requirements which must be met to be eligible for consideration, and Applicant responsibilities. Applicants must take the responsibility to carefully read the entire solicitation, ask appropriate questions in a timely manner, submit all required responses in a complete manner by the required date and time, make sure that all procedures and requirements of the solicitation are followed and appropriately addressed.

AGREEMENT REQUIREMENTS

The content of this solicitation shall be incorporated by reference into the final agreement. See the sample agreement terms and conditions included in this solicitation.

The Energy Commission reserves the right to negotiate with Applicants to modify the project scope, the level of funding, or both. If the Energy Commission is unable to successfully negotiate and execute a funding agreement with an Applicant, the Energy Commission, at its sole discretion, reserves the right to cancel the pending award and fund the next highest ranked eligible project.

The Energy Commission must formally approve all proposed awards. ARFVTP agreements for over \$75,000 must be scheduled and considered at an Energy Commission Business Meeting for approval by the Energy Commission.

Public agencies that receive funding under this solicitation must provide an authorizing resolution approved by their governing authority to enter into an agreement with the Energy Commission and designating an authorized representative to sign.

The Energy Commission will send the approved agreement, including the general Terms and Conditions and any additional terms and conditions, to the Recipient for review, approval, and signature. Once the Recipient signs, the Energy Commission will fully execute the agreement. Recipients are approved to begin the project only after full execution of the agreement.

NO AGREEMENT UNTIL SIGNED AND APPROVED

No agreement between the Energy Commission and the successful Applicant is in effect until the agreement is signed by the Recipient, and approved and signed by the Energy Commission representative.

The Energy Commission reserves the right to modify the award documents prior to executing the agreement.